

Manning & Napier Advisors, Inc.

Job Description

Position: Portfolio Strategist – RIA Group

Division: Advisory Advantage Corporation (AAC)

Summary

The individual in this position will be responsible for providing advanced investment philosophy, analytical process, and specific portfolio construction information to AAC sales reps, Personal Financial Advisors (“PFAs”), and other members of AACs distribution channels. It is expected that this position will travel for business purposes regularly.

Responsibilities

Research Liaison

- Act as main liaison between Manning & Napier investment research department and AAC broader audience including PFAs, end-clients, and other RIA’s utilizing AAC’s services.
- Keep regularly updated as to research process and portfolio changes.
- Collaborate with a wide variety of functional areas such as sales, research, marketing, and operations to develop and provide product definitions responsive to customer needs and market opportunities.
- Provide technical expertise to sales reps for ongoing communication and training purposes

Sales and Service

- Assist sales reps in key point-of-sale situations and new business opportunities
- Support AAC channel with technical expertise in service situations including but not limited to: PFA/Client review meetings, conferences/tradeshows, periodic PFA investment conference calls, on-site due diligence visits.
- Keep updated on industry trends and provide competitive analysis where appropriate

Qualifications:

Minimum 5 years investment experience, preferably in a consulting role

Series 6, 63, 65 licensed

CFA candidate preferred

Working knowledge of Microsoft Word, Excel, PowerPoint, IE, Outlook

Strong problem solving skills in a fast-paced environment

High attention to detail

Ability to work independently with focus on regular deadlines

Strong command of language for both verbal and written situations

For consideration send resume to Greg Howe, Senior Recruiter, Manning & Napier Advisors, Inc., 290 Woodcliff Drive, Fairport, NY 14450 or email ghowe@manning-napier.com.